

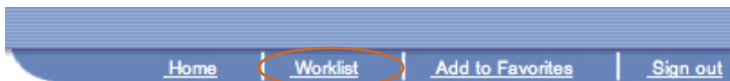
Approving a Travel Authorization or Expense Report

Approving Foreign Travel Authorizations and Expense Reports

1. In TREX, FOREIGN Travel Authorizations are routed to a specific Division Director or Division Director designee for approval.
2. All Expense Reports are routed to an approver who has SAS authority to approve expenses for the primary project selected in the Authorization or Expense Report.
3. When FOREIGN Authorizations or Expense Reports are submitted for approval in TREX, an email is automatically sent to the approver.
4. To approve an Authorization or Expense Report, an approver has two choices:
 - Use the *Worklist* link at the top of your TREX page to open the Authorization or Expense Report.
 - Use the link inside the email received to open the document to be approved.

I. Using the Worklist to open a document

- Approvers do not need to use the email link to open and approve a travel document in TREX. They can sign into TREX and click on the *Worklist* link at the top of the TREX page.



- After clicking on *Worklist*, TREX displays the complete list of documents currently awaiting approval by the approver.

Worklist					
From	Date From	Work Item	Worked By Activity	Priority	Link
Pecoraro,Aurora	04/19/2008	Expense Report Approval	Approve Expense Report		0000010006
Sebek,Klara	05/16/2008	Expense Report Approval	Approve Expense Report		0000010059
Pecoraro,Aurora	06/18/2008	Expense Report Approval	Approve Expense Report		0000010136
Pecoraro,Aurora	06/18/2008	Expense Report Approval	Approve Expense Report		0000010137
Pecoraro,Aurora	06/20/2008	Expense Report Approval	Approve Expense Report		0000010150
Cruz,Rosa C	07/17/2008	Expense Report Approval	Approve Expense Report		0000010216

- To open a specific document from the list in your worklist, click on the document's [blue link](#). TREX displays the document.

Approve Expense Report

Expense Report Summary

Aurora Pecoraro Report ID: 0000010233

Report Information

Trip Name: Trip Name LBNL Trip #: 000060564 Trip Type Foreign

Supplemental Exp. Report ☐ Trip < 24 Hours ☐ Arranger: ABCDEFG

Business Purpose: Site Visit Trip Comments: Trip comments go here.

Report Status: Submitted

Created On: 07/21/2008 By: MFATKINSON Last Updated: 07/21/2008 By: MFATKINSON

Accounting Date: 07/21/2008

Trip Description and Benefit

Trip description goes here.

Project Information					
Project	Primary	Percentage Split	B +R Classification	Project Org	MARS Cod
1 300704	<input checked="" type="checkbox"/>	50.00	YN0100000	CF	OPEXP

- If the approver knows he or she will be on vacation or unavailable, he/she must notify the staff of this event in order to avoid documents sitting in his/her queue waiting for approval.

II. Using the email link to open a document

- When Foreign Authorizations and Expense Reports are submitted in TREX, an email like the one below is sent to the approver.

Subject: Travel expense report is awaiting your approval.
From: fms-logmail@mailbot.lbl.gov
Date: Thu, 31 Jul 2008 10:31:21 -0700 (PDT)
To: APecoraro@lbl.gov

Travel expense report is awaiting your approval.

Traveler : Malone,David ID: 001688
Arranger : Pecoraro,Aurora
Trip Name : DEMO ER NO AUTH
LBNL Trip # : 000060666
Report ID : 0000010294
Total Expenses : \$1498.5
Reimbursement : \$848.5
Begin Date : 01/20/2008 End Date: 01/25/2008
First Business Location: DENVER,CO
Business Purpose : Site Visit

https://trex.lbl.gov/psp/trex/ZT_TRAVEL/ERP/c/ADMINISTER_EXPENSE_FUNCTIONS.TE_APPROV

- III. **Approving a document.** The approver has the option to approve the document or to send it back for revision if any information is incorrect.

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Itinerary Legs

Primary Information					
Departure Date	Departure City, State or City, Country	Arrival Date	Business City, State or City, Country	Number of Nights at Location	Number of Personal Days
1 10/20/2007	BERKELEY, CA	10/20/2007	SACRAMENTO, CA	2	
2 10/22/2007	SACRAMENTO, CA	10/22/2007	BERKELEY, CA		

Expense Report Totals

Employee Expenses:	1,464.00 USD	Due Employee:	1,464.00 USD
Non-Reimbursable Expenses:	0.00 USD		
Prepaid Expenses:	0.00 USD		
Cash Advances Applied:	0.00 USD		

Current Approval Status

Routing	Name	Status	Date
Originator	Pecoraro,Aurora	Submitted	04/19/2008
Division Approver 1	Axthelm,Charles A		
Pre-Pay Auditor			

Approval Detail

Name: Axthelm,Charles A

Comment: [Approved 5/01/08.](#)

[Approve Report](#) [Send Back for Revision](#)

- If you are approving the document, you have the option to enter any pertinent comments.

Comment: [Approved 5/01/08.](#)

[Approve Report](#) [Send Back for Revision](#)

☒ This report will be approved.

Note: Remember to confirm the approval by clicking the OK button.

[OK](#) [Cancel](#)

- If you are sending the document back for revision, you are required to enter your comments and instructions in the Comment box.